

**Report to the Commissioners, prepared by Lisa Sheppard, Director
August 27, 2020**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2019 actuals
FY 2020 annual targets
FY 2020 actuals
FY 2020 actuals as a percentage of annual targets
FY 2020 actuals as a percentage of FY 2019 actuals
FY 2021 actuals to date
FY 2021 annual targets
FY 2021 actuals as a percentage of FY 2021 annual targets

The general target is 8.33% for FY 2021 to date, July 1-31, 2020, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

Data to note:

- FY 2020: Although complete data was reported in July, three of the target percentages were incorrectly calculated:
 - # Receiving Meals on Wheels: reported 119%, actual is 123%
 - # Seniors Receiving Congregate Meals: reported 117%, actual is 101%
 - # Eagle Transit Unduplicated Riders: reported 59%, actual is 79%
- **Nutrition**
 - Although the dining rooms at all sites remain closed, we continue to record “congregate” clients and meals each month as the meals provided to Meals on Wheels volunteers are considered congregate meals.
 - The continuing impact of COVID can be seen in both the number of Meals on Wheels clients and the number of meals served. We began the fiscal year with 337 home-delivery clients, compared to 225 last year. Total home-delivered meals served in July were 7,368 compared to 4,167 in July of last year. We served 1,497 more meals total in July 2020 over July 2019, an increase of 21%. We are on track to serve more than 103,000 meals this year at the current rate of demand (compared to what has been a fairly steady average of about 80,000 meals in recent years). Some clients may go off home-delivered service as COVID concerns ease, but many meet the normal criteria for the program and may continue indefinitely.

- All current clients complete a nutritional assessment in July. In addition, many of the assessments completed in the last quarter were recorded in July, which accounts for the high number of assessments reported.
- **Transportation**
 - All routes/services are running on a normal schedule with the exception of Columbia Falls, which we continue to offer one day a week due to decreased demand.
 - Rides continue to be down on all routes/services due to COVID, but we are now at 76% of the pre-COVID monthly average (excluding rides related to the Glacier National Park Cooperative Agreement).
 - Fixed route rides are 61% of the total for July 2019.
 - Fixed-deviated rides are 44% of the total for July 2019, primarily due to decrease in demand/service in Columbia Falls. Rides in Whitefish are 75% of the total at this time last year.
 - Paratransit/Premium Dial-A-Ride rides are 86% of the July 2019 total. The number of unduplicated paratransit/DAR passengers is down 23% from this time last year.
 - Complaints were unexpectedly high this month but a number of the complaints were about other passengers.
- **Information and Referral/Assistance**
 - I&R/A contacts continue to be high and we anticipate this is likely the “new normal” given both the aging demographic in our area as well as COVID-related concerns.
- **Independent Living Services**
 - The number of clients receiving Independent Living services is at 61% of the target for the fiscal year. However, we are at the maximum number of clients we can serve at one time based on our most recent FY 2021 estimates given the available budget and the number of monthly units of service approved for current clients. We’re putting new individuals who request service on a waiting list until capacity is freed up by existing clients going off service or reducing hours used.
 - As mentioned in previous reports, we did not conduct an annual survey in FY 2020 but will do so this fiscal year. We typically conduct our annual surveys in March.
- **Benefits Counseling**
 - Most savings are realized during Medicare Open Enrollment, which takes place October-December.
 - We continue to provide assistance via phone, email and fax, and the public can access our Medicare 101 class on our website.
- **Ombudsman**
 - Nursing homes and assisted living facilities are still mostly closed to outside visitors. Ombudsman staff continue to conduct all consults with facility staff, residents and families via phone or email.
 - Consults are ahead of pace with much of the increase continuing to be directly related to COVID concerns.

See each section below for relevant updates on COVID-19 Response. We are continually re-evaluating the status of all our programs. We have and will continue to consult with the Health Officer prior to making any substantive changes.

AOA Administration

Budget and Contracts

- We are working with Finance on year-end financials.
- We are working on year-end financial reports/reconciliation for DPHHS and MDT.
- Tara has reviewed the FY 2021 DPHHS contract and it will be on the Commissioners' agenda shortly. Total federal funds are \$448,498 (\$4,574 higher than our original FY 2020 allocation); state funds are flat at \$412,136.
- In the last quarter of FY 2020, as part of federal COVID relief, we received additional increases in Older Americans Act Title III federal funding to assist in our immediate and emerging response and future preparations. We have carried unspent funds forward into FY 2021. They must be spent by September 2021.
- We have received and will continue to receive additional federal funding for transit as part of the CARES Act. MDT has not yet made an allocation by area but have indicated they may do so at some point in FY 2021. The funds do not require a local match and are intended to be spent prior to regular funding allocations effective January 20, 2020. MDT has not yet determined when funds must be spent and is not requesting a contract amendment at this time, but that may change. (See Eagle Transit section below for more detail.)

Building

- The CDC continues to recommend that older and vulnerable adults limit their interactions with others as much as possible and to take extra precautions when they do have contact. In light of this guidance and the case rate in the Flathead, we continue to keep our South Campus offices closed to the public. We are successfully providing service in other ways and are prepared to meet in person with clients when necessary.

HR/Staff Development

- We continue to try to fill open driver positions at Eagle Transit but are having difficulty.
- We continue to work with HR to restructure some existing positions and request new positions related to changing needs and Older Americans Act and transit increases.

State/Federal/Legislative Issues

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
 - M4A is working closely with the DPHHS State Unit on Aging (SUA) to resolve ongoing funding and structural issues with the federally mandated Ombudsman Program.
 - We have discontinued our weekly M4A/SUA calls and have moved to an every other month schedule.
 - Lisa participated in an interview as part of the \$300,000 grant award from the Administration on Community Living (ACL) to DPHHS/M4A to assess and develop strategies to meet emerging and ongoing needs related to COVID and its aftermath. M4A has engaged two consultants to work with the area agencies to complete portions of the work.
- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to us as members
 - n4a is providing valuable, updated information related to the national COVID response, federal funding and local/regional examples of creative problem-solving on the part of the aging network.

AOA Advisory Council

- We met via conference call on July 23rd to discuss COVID-related service updates and the results of our own local community needs assessment.
- Our next regularly scheduled meeting is September 10th and will most likely be held via Zoom or conference call.

Outreach/Education/Media/Events

Note: Transportation related outreach is noted in the Eagle Transit section below.

- 7/1/2020: Community Needs Survey ad, Hungry Horse News; 6500
- 7/2/2020: promotion of Community Needs Survey, Kalispell Chamber of Commerce e-newsletter
- 7/5/2020: Community Needs Survey ad, Daily Inter Lake; 17,500
- 7/15/2020: Zoom presentation to Parkinson Support Group; 16
- 7/16/2020: KGEZ interview re. Melas on Wheels; 15,000
- 7/16/2020: request for Meals on Wheels volunteers, Kalispell Noon Rotary; 120
- 7/17/2020: request for Meals on Wheels volunteers, Daily Inter Lake; 17,500
- 7/22/2020: recorded interview re. Meals on Wheels for "What's Going On," Flathead Electric radio show (air Aug 4th)
- 7/22/2020: recorded interview re. AOA service updates for "What's Going On," Flathead Electric radio show (air Aug 5th)
- July 2020: KGEZ, 48 ads per month, Benefits CheckUp
- Medicare 101 class available on AOA website; 54 visits

Eagle Transit

- COVID-19: All fixed route city buses in Kalispell, paratransit/Premium Dial-A-Ride, the Whitefish city bus and the Tri-City Commuter are running on a normal schedule. Columbia Falls continues on a reduced once a week schedule. We are encouraging onboard distancing as long as demand allows. Drivers are wearing masks and passengers are notified to do so per the Governor's directive. Enhanced cleaning of vehicles continues.
- Montana Department of Transportation (MDT) and Federal Transit Administration (FTA):
 - COVID-related funds:
 - Per FTA guidance, MDT reimbursed all expenditures from January 20th to June 30th with CARES Act funds at 100%. They extended the 100% reimbursement for the 1st quarter of FY 2021. No local match is required and no reduction is made for fare collections.
 - We can request additional payment for any operational or capital costs that support us to prevent, respond to or prepare for COVID-related concerns or conditions (including negative economic impact on the community and/or the transit system itself) now and going forward. We are in discussion with MDT about several projects.
 - MDT is setting aside some of the CARES Act funds for facility and other capital purchase/construction. We are in discussion with MDT about several projects.
 - MDT completed our three-year compliance review with an onsite visit on August 14th. There were no findings.
- Outreach/Education/Media/Special Events:
 - To satisfy federal regulations, daily radio ads ran on KGEZ.
 - Tom was interviewed on KGEZ, aired August 4th.

- **Operations:**
 - We're continuing to move forward with Mountain Climber rebranding efforts. We have been soliciting stakeholder input and are hoping to select a new logo/bus wrap design in the coming weeks.
 - The SPARKS after school route is resuming with the start of the new school year. At this time, the plan is to operate as we did last year prior to the schools closing due to COVID.
 - We continue to work with MDT re. the funding and logistics of converting our buses to propane, which was identified as a TAC priority in our FY 2021 Transportation Coordination planning process. The state is looking favorably on the proposal as it would generate substantial annual operational savings.
 - We are still working on the following:
 - Implementation of a volunteer driver program
 - Seasonal summer/winter commuter routes
 - Exploration of general public demand response options and related technology to increase service flexibility
- **Staff Development/Training:**
 - We're continuing to work with HR to, with Commissioner approval, restructure some positions and add permanent and temporary positions in line with our FY 2021 budget as submitted to MDT.
- **Transportation Advisory Committee (TAC)**
 - The 8/6/2020 TAC meeting was canceled due to scheduling conflicts.
 - We will conduct our annual meeting and officer elections via Zoom on October 1st.
- **Glacier National Park**
 - We are still waiting for the completion/release of the white paper from the Volpe National Transportation Center (part of USDOT) commissioned by Superintendent Mow to summarize previous plans as a starting point for a transportation work group convened by GNP to include regional, state and local stakeholders.

Nutrition

- **COVID-19:** All protocols reported last month continue to be in place with the exception of the weekly "snack bags." We have discontinued this service due to less need and high cost.

I & R/Assistance/Ombudsman/Independent Living Services

- **COVID-19:** All of the protocols reported last month remain in place.
- We are almost ready to launch our individualized emergency planning services, which are supported by a \$10,000 grant from Blue Cross Blue Shield to M4A. We are putting together "stay/go bags" of essential items as part of the planning package.
- **Community Needs Assessment:** We've completed the first two phases of our community assessment to determine what needs arising from COVID are unmet and what we might do, on our own and with community partners, to better serve older adults as we all continue to deal with COVID and in future crises or emergencies.
 - The first phase consisted of targeted interviews with a wide variety of community service providers, health providers, essential business owners/workers, etc. We sent a summary of the results to those who provided input for the assessment.
 - The second phase of the assessment was a survey targeting older adults in the Flathead. We promoted it widely throughout our community using a multi-media approach to encourage participation. The survey was available online and in paper form. Here are some highlights of what we learned:

- **One-third of respondents are experiencing high to very high anxiety** as a result of the pandemic. 43% are experiencing moderate anxiety.
- When asked about their **biggest concern or worry**:
 - Almost 60% said the health and well-being of family or friends
 - 56% said lack of social connection
 - Almost half were worried about catching the virus themselves
 - 40 % cited a lack physical activity
 - 35% said finding scarce supplies; 32% said buying groceries
 - 34% said loneliness, anxiety or depression
- **75% of people said they knew where to go for help**; but that means 25% didn't know and we want to work on that
- **61% of respondents said they typically get help with daily activities from a caregiver**, primarily from family or friends (as opposed to paid staff); **26% of those said the help they receive from their caregiver had been disrupted by COVID**
- **Approximately one-quarter were caregiving for someone else** (grandchildren, older relative, older friend)
- Regarding **use of technology** (computer, tablet, smartphone):
 - 70% of people used it to stay informed
 - 53% used it to stay connected socially
 - 32% used it for telehealth
 - 38% used it stay mentally active
 - 18% said they don't use it at home
 - 7% said they don't use it at home, but are interested in doing that
- Regarding **emergency planning** prior to COVID; 39% said they had a plan in place, 61% said they didn't; since we're going to be offering emergency planning assistance we also asked if people would be interested in that service (50% said they would)
- **Demographics**:
 - Age - a handful were under 50, 17% were 50-64; 32% were 65-74; 33% were 75-84 and 18% were 85+
 - Household size - 56% live alone, 36% have two in their household, 8% have 3 or more
 - Income – 42% have monthly income of \$1,595 or below; 20% between \$1,596-\$2,657; and 27% \$3,190 or above
- **We calculated the responses we received from the online portion on their own before adding the paper responses.** Interestingly, but not necessarily surprisingly, we saw differences in age, income, household size and use of technology when those who responded on paper were added to the mix. The age of respondents increased and income decreased. The percentage who live alone increased and the percentage of those who reported using technology during the pandemic decreased.
 - The final phase will focus on plans/options to address identified needs and gaps in service.
- **Veteran Directed Care (VDC) Program**:
 - New enrollments are still suspended by the VA. Directors of the three Area Agencies in Montana that offer the service met yesterday to discuss next steps.
 - We have 33 vets enrolled, down from 36 last month and a high of 43 in February. Some vets are being denied continued enrollment at their 6-month reauthorization. We are assisting these vets with their appeals.
- **Independent Living Services**:
 - COVID-19: All protocols reported last month remain in place.

- As noted above, we are at capacity given the new fiscal year budget and the number of total approved hours of service for all IL clients.
- We have re-evaluated our service mix based on a number of factors and have adjusted our FY 2021 budget to focus more heavily on home-maker and respite services.
- Caregiver Support
 - Staff completed training on Trualta, our new online support platform for caregivers. We are in the process of identifying and contacting caregivers with whom to pilot the service.
 - All staff have now completed the Powerful Tools for Caregivers training and are exploring ways to offer the service virtually.
- Ombudsman Program
 - COVID-19: All protocols reported last month remain in place.

Senior Centers - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- AOA staff are in the process of preparing the FY 2021 agreements with the Centers.
- COVID-19:
 - All dining rooms remain closed for congregate meals.
 - The Kalispell Senior Center (KSC) continues to be the only center offering onsite activities, some at the South Campus and some at the Country Kitchen at the Fairgrounds (when the space is available).
- Whitefish Community Center
 - The Center will use the common area kitchen in the senior apartment complex next to the Center for meal prep/delivery while the Center is shut down for repairs.
 - The Center received a \$10,000 Montana CARES Act grant.
- Bigfork Community Center
 - The County and the Center are working on a possible agreement for the Center to rent space from the Community Methodist Church.

August 2020 Report: Performance Measures Tables - July 2020 stats (FY 2021)

8.33%

MEASURE	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	July	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
# Receiving Independent Living Services	98	119	86	72%	88%	67	0	67	110	61%
# Receiving Meals on Wheels	401	450	554	123%	138%	377	0	377	450	84%
# Seniors Receiving Congregate Meals	1,538	1,400	1,408	101%	92%	132	0	132	1,400	9%
# Eagle Transit DAR Unduplicated Riders	333	335	266	79%	80%	113	0	113	335	34%
Client Savings from Benefits Counseling	N/A	\$400,000	\$623,758	156%	N/A	\$7,786	\$0	\$7,786	\$500,000	2%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	93%	88%	87%	99%	94%	90%	0%	90%	88%	102%
Per Meal Cost of Nutrition Services	\$6.80	\$7.00	\$7.65	109%	113%	\$3.73	\$0.00	\$3.73	\$7.50	50%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	97%	100%	103%	103%	N/A	N/A	N/A	97%	N/A
% Overall Satisfaction with Independent Living Services from Annual Survey	97%	90%	moved to next FY	N/A	N/A	N/A	N/A	N/A	90%	N/A
Maximum annual number of transportation complaints	4	25	15	60%	375%	6	0	6	25	24%
WORKLOAD INDICATOR	FY 2019 Actuals	FY 2020 Target	FY 2020 Actuals	FY 2020 % of Target	FY 2020 as % FY 2019	July	Total Last Report	Total/Avg. to Date	FY 2021 Target	% Target
Nutrition						July				
Total Meals	78,515	80,000	90,538	113%	115%	8,607	0	8,607	80,000	11%
MOW	46,658		62,696	N/A	N/A	7,368	0	7,368		
Social Dining (Congregate)	31,857		27,842	N/A	N/A	1,239	0	1,239		
Nutritional Assessments Conducted	1,858	2,000	1,311	66%	71%	1,030	0	1,030	1,800	57%
Transportation						July				
Total Ride Count	116,017	100,000	88,395	88%	76%	4,970	0	4,970	100,000	5%
Paratransit/Dial-A-Ride Count	26,784	30,000	20,971	70%	78%	1,589	0	1,589	30,000	5%
City, Commuter and Other Ride Count	89,233	70,000	67,424	96%	76%	3,381	0	3,381	70,000	5%
Eagle Transit Outreach/Special Events	31	25	41	164%	132%	2	0	2	30	7%
Information and Referral/Assistance						July				
Outreach, Information, Referral Contacts	26,014	18,000	23,823	132%	92%	2,254	0	2,254	18,000	13%
Outreach/Education/Media Efforts	129	120	139	116%	108%	11	0	11	120	9%
Independent Living			57%			July				12%
Homemaker Hours	1,433	2,000	1,853	93%	129%	242	0	242	1,430	17%
Escorted Transportation Rides	886	2,174	747	34%	84%	74	0	74	1,500	5%
Respite Hours	1,793	2,857	1,757	61%	98%	331	0	331	2,142	15%
Comm. Support/Sr. Companion Hours	508	1,471	383	26%	75%	0	0	0	750	0%
Personal Care Hours	146	174	183	105%	125%	40	0	40	150	27%
Benefits Counseling						July				
Benefits Counseling Hours of Service	1,193	500	694	139%	58%	17	0	17	650	3%
Ombudsman						July				
Ombudsman consults/cases opened	1,116	1,000	1,406	141%	126%	128	0	128	1,000	13%